

Insight Enterprise

Scoring Plan Guide

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Patent Pending.

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Scoring Plans

Insight Enterprise Scoring Plans give you the ability to automatically evaluate an applicant based on user-defined supplemental questions. Scoring Plans are used to determine if applicants meet the minimum qualifications of the position and to calculate an applicant's score in an evaluation step by granting points for desired criteria.

Scoring Plan Components

Every scoring plan consists of three components:

- Structured supplemental questions on the job posting
- Scoring Plan (scoring factors, cases, and conditions)
- Exam Plan Evaluation Step – set-up to use the scoring plan

Terminology

Insight Enterprise scoring terminology that you should be familiar with include:

- **Scoring Plan** – The scoring plan is associated with the recruitment and is comprised of various evaluation scenarios that will be used to automatically evaluate an applicant's training and experience based on their answers to supplemental questions. There can be only one scoring plan per posting and exam plan.
- **Scoring Factor** – The scoring factor is a high-level scenario that is used to score an applicant (sometimes referred to as Minimum Qualifications (MQ's) or desirables).
- **Scoring Factor Case** – The scoring factor case is used to assign supplemental question answers that will be used to evaluate and score the applicant.
- **Case Condition** – The case conditions are used to define exactly which supplemental question answers will be evaluated within each scoring factor case.
- **Condition Type** – The condition type is used to determine which criteria define the acceptable combination of supplemental question answers.

What Type of Scoring Plan Do You Need?

The method used to develop the scoring plan will differ depending on whether or not the scoring plan will be used for minimum qualification screening **only** or a combination of minimum qualifications and automated scoring of desirable qualifications.

Minimum Qualification Screening Only

When using a scoring plan to conduct Minimum Qualification (MQ) screening only, you will set up the job-specific supplemental questions as scored questions. By definition, something in the scoring plan must be scored. A scoring plan cannot consist of pass/fail questions only. Consider the following example:

Example: You are posting an Administrative Assistant opening.
The minimum qualifications for this position are:

- High school diploma or GED
- Two years or more of clerical experience

Training Exercise 1:

- 1.1 Create the exam plan and job posting for the recruitment. At the bottom of the 'Add Job Posting page, select 'Yes' for Supplemental Questions and then click the 'Add' button.

- 1.2 You should now be on the 'Supplemental Questions' page.

Create Structured Supplemental Questions

Create the following questions:

Question 1: Do you have a High School diploma or G.E.D.?

Question 2: Do you have at least two years of clerical experience?

- **Response Format:** Select from Choices
- **Input Type:** Radio
- **Responses Options:** Yes – 1 point; No – 0 points
Note: Be sure to enter an Internal Code, such as 'Y' for Yes and 'N' for No.
- **Required Question:** Yes

* Question

* Response Format ☐ Text Answer ☒ Select From Choices Answer ☐ Yes/No Answer

* Input Type

* Response Options When you choose the "Select From Choices" response format, you need to provide several response options from which job seekers can choose. To enter the options use a spreadsheet box displayed below.

- **Internal Code** (optional) - (SIGMA or TRAC) code -- *Ex. LA*
- **Response Option** - Actual response option as it appears to a job seeker. -- *Ex. Los Angeles*
- **Points** (optional) - A number of points for this question. -- *Ex. 0.5*

Please enter the response options into the space below.

Internal Code	Response Option	Points	Sort
Y	Yes	1	↑ ↓ DELETE
N	No	0	↑ ↓ DELETE

* Is the candidate required to answer the question? ☒ Yes ☐ No

Confidential Question ☐ Yes ☒ No

Employer Use Only ☐ Yes ☒ No

1.3 After creating supplemental questions, click on the **‘Scoring Plan’** link at the top of the page.

Create Scoring Plan

Click the **‘Add New Scoring Factor’** link

Fill in the Scoring Factor information:

- **Factor Title:** **‘MQs’**
- **Type:** **‘Scored’**
- Click **‘Save’**

00002 Administrative Assistant 2

[Scoring Plan](#) > [Scoring Factors](#) > Scoring Factor Cases

* Factor Title

* Type ☐ Pass/Fail ☒ Scored

Comments

Fill in the additional required fields:

- **Score Points From: 'Supplemental Questions'**
- **Factor Questions:** Place a **check mark** in the box next to each question that should be automatically scored
- Click **'Save'**

00002 Administrative Assistant 2

[Scoring Plan](#) > [Scoring Factors](#) > Scoring Factor Cases

* Factor Title

* Type ☐ Pass/Fail ☒ Scored

* Score Points ☒ Supplemental Questions
From ☐ Cases

* Factor Questions

☒ Do you have a High School diploma or G.E.D.?

☒ Do you have at least two years of clerical experience?

Formula

Comments

The scoring factor will be listed on the Scoring Plan page:

00002 Administrative Assistant 2 [View Supplemental Questions](#) | [Show Questions](#)

Scoring Plan > Scoring Factors > Scoring Factor Cases

[Add New Scoring Factor](#) [Show Cases](#)

SF	Name	Type	Case	# of Cases	Action
1	MQs	Score	Auto Score	N/A	Edit Delete

1.4 Click on the **Job Title** on the upper left to return to the Job Posting

1.5 Click on the **Exam Plan** link:

Advertise From:	March	23	2006
Advertise To:	Continuous		
* Job Title:	Administrative Assistant 2		
Job Number:	00002		
Exam Plan:	00002 - Administrative Assistant 2		
* Job Type:	Full-Time		
* Category:	<div> 911 Telecommunications Accounting and Finance Administrative Assistant Agriculture Airports </div>		<div> Add > < Remove </div>
			Administration Clerical & Data Entry

Evaluation Plan Set-up

Click the 'Add Step' link in the Evaluation Step section of the Exam Plan:

Job Posting					
Job #	Job Title	Status	Last Updated	Assigned To	Action
00002	Administrative Assistant 2	Continuous	03/23/06	King Neptune	Edit Delete
Recruiting Plan Add New					
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action
Evaluation Steps Add Step View Applicants (0) View Applicants by Step (0) App Flow					
Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	

Fill in the Evaluation Step information:

- **Step Type:** 'Supplemental Questionnaire'
- **Step Name:** Enter any name to describe this evaluation step'
- **Evaluate On:** 'Scored'
- Click 'Save'

* Step Type:	Supplemental Questionnaire
Step Name:	MQs - Auto Screening
Display Candidate Status As:	
* Evaluate On:	<input checked="" type="radio"/> Scored <input type="radio"/> Pass/Fail
Comments:	
<input type="button" value="Save"/>	

Note: The combination of 'Supplemental Questionnaire' step type and evaluating on a 'Scored' basis are necessary for Insight to utilize the scoring plan for this evaluation step.

Fill in the additional required Evaluation Step fields:

- **Final Score Weight:** '0'
(when screening for MQ's only, only applicants with 100% will pass, so the weight doesn't really make a difference in this example)
- **Calculate Final Score:** 'Percentage Score'
- **Max Raw Score:** '2'
(the maximum number of points that an applicant can earn on all scored questions in the scoring plan)
- **Passing Score %:** '100%'
(applicants must answer 'Yes' to both questions, i.e. 2 out of 2 points = 100%)
- Click 'Save'

* Step Type: Supplemental Questionnaire

Step Name: MQs - Auto Screening

Display Candidate Status As:

* Evaluate On: ☒ Scored ☐ Pass/Fail

* Final Score Weight: 0 % Max: 100

* Round Score: ☐ Yes ☒ No

* Calculate Final Score Based on: ☐ Rescaled Score ☒ Percentage Score

* Max Raw Score: 2

* Passing Score Percentage: 100 %

Comments:

Save

The scoring plan set-up is now complete.

- 1.6 Enter a few applications for the job posting with a combination of different responses to the supplemental questions.
- 1.7 Access the Exam Plan and click on the 'View Applicants by Step' link
- 1.8 Update the disposition of the applicants in step 1 to passing
- 1.9 Advance the applicants to Step 2
- 1.10 Notice that the applicants scores are automatically entered:
 - Applicants who scored 100% are in a passing status.
 - Applicants who scored less than 100% are in a failing status.

Step 2: MQs - Auto Screening
3 records found.

Candidate	SSN	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Anderson, Ashley		View	Pass - 100.00%		Paper	03/23/06 07:13 PM	N/A
<input type="checkbox"/> Barry, Bill		View	Fail - 50.00%		Paper	03/23/06 07:15 PM	N/A
<input type="checkbox"/> Cortez, Candace		View	Fail - 0.00%		Paper	03/23/06 07:16 PM	N/A

Select Action: == Select ==

Select Candidate(s): == Select ==

Go

Combined Minimum Qualifications Screening and Desirables Scoring

When using a scoring plan to conduct by MQ and Desirable screening, you will set up the MQ questions without points and questions containing desirable criteria with points. Consider the following example:

Example: You are posting an Accountant opening.

The **minimum qualifications** for this position are:

- Bachelor's degree
- CPA license
- Two years of professional level accounting experience

The **desirable qualifications** for this position are:

- Master's degree
- Excel proficiency
- Crystal Reports proficiency
- More than two years experience

Training Exercise 2:

- 2.1 Create the exam plan and job posting for the recruitment. At the bottom of the 'Add Job Posting' page, select 'Yes' for Supplemental Questions and then click the 'Add' button.

The screenshot shows the 'Salary Information' form. At the bottom, the 'Supplemental Questions' section has radio buttons for 'Yes' and 'No'. A red arrow points to the 'Add' button, which is located next to the 'Spell Check' and 'Reset' buttons.

- 2.2 You should now be on the 'Supplemental Questions' page.

Create Structured Supplemental Questions

Question 1: Which best describes your level of education?

- **Response Format:** Select from Choices
- **Input Type:** Radio
- **Responses Options:**
 - High School - 0 pts
 - Some college – 0 pts
 - Associate’s Degree – 0 pts
 - Bachelor’s Degree – 0 pts
 - Master’s Degree – 5 pts

Note: Be sure to enter an Internal Code for each option .
- **Required Question:** Yes

Question 2: Do you have a CPA license?

- **Response Format:** Select from Choices
- **Input Type:** Radio
- **Responses Options:** Yes, No – no points for either
Note: Be sure to enter an Internal Code, such as 'Y' for Yes and 'N' for No.
- **Required Question:** Yes

Question 3: How many years of professional-level accounting experience do you have?

- **Response Format:** Select from Choices
- **Input Type:** Radio
- **Responses Options:**
 - 0-2 years – 0 pts
 - 2-3 years – 0 pts
 - 3-4 years – 3 pts
 - 4-5 years – 6 pts
 - 5 years or more – 9 pts

Note: Be sure to enter an Internal Code for each option .
- **Required Question:** Yes

Question 4: Which of the following best describes your level of proficiency with **Microsoft Excel**?

- **Response Format:** Select from Choices
- **Input Type:** Radio





















- **Responses Options:**
 - **None – 0 pts**
 - **Beginner – 2 pts**
 - **Intermediate – 5 pts**
 - **Advanced – 10 pts**

Note: Be sure to enter an Internal Code for each option .
- **Required Question:** **Yes**

Question 5: Which of the following best describes your level of proficiency with developing **Crystal Reports**?

- **Response Format:** **Select from Choices**
- **Input Type:** **Radio**
- **Responses Options:**
 - **None – 0 pts**
 - **Beginner – 2 pts**
 - **Intermediate – 4 pts**
 - **Advanced – 6 pts**

Note: Be sure to enter an Internal Code for each option .
- **Required Question:** **Yes**

# Question	Req.	Conf.	Emp.	Action
1. Which best describes your level of education? <input type="radio"/> High School <input type="radio"/> Some College <input type="radio"/> Associate's Degree <input type="radio"/> Bachelor's Degree <input type="radio"/> Master's Degree	•			    Edit Inactivate Up Down
2. Do you have a CPA license? <input type="radio"/> Yes <input type="radio"/> No	•			    Edit Inactivate Up Down
3. How many years of professional-level accounting experience do you have? <input type="radio"/> 0 - 2 years <input type="radio"/> 2 - 3 years <input type="radio"/> 3 - 4 years <input type="radio"/> 4 - 5 years <input type="radio"/> 5 years or more	•			    Edit Inactivate Up Down
4. Which of the following best describes your level of proficiency with Microsoft Excel ? <input type="radio"/> None <input type="radio"/> Beginner <input type="radio"/> Intermediate <input type="radio"/> Advanced	•			    Edit Inactivate Up Down
5. Which of the following best describes your level of proficiency with developing Crystal Reports ? <input type="radio"/> None <input type="radio"/> Beginner <input type="radio"/> Intermediate <input type="radio"/> Advanced	•			    Edit Inactivate Up Down

2.3 After creating supplemental questions, click on the **'Scoring Plan'** link at the top of the page.

Create Scoring Plan

2.4 Scoring Factor #1:

Click the **'Add New Scoring Factor'** link

Fill in the Scoring Factor information:

- **Factor Title:** **'MQ - Education'**
- **Type:** **'Pass/Fail'**
- Click **'Save'**

Fill in the additional required fields:

- **Pass Required:** **'Yes'**
- **Factor Questions:** Place a **check mark** in the box next to the first question relating to education.
- Click **'Save'**

* Factor Title	MQ - Education
* Type	<input checked="" type="radio"/> Pass/Fail <input type="radio"/> Scored
* Pass Required	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Factor Questions	<input checked="" type="checkbox"/> Which best describes your level of education? <input type="checkbox"/> Do you have a CPA license? <input type="checkbox"/> How many years of professional-level accounting experience do you have? <input type="checkbox"/> Which of the following best describes your level of proficiency with Microsoft Excel ? <input type="checkbox"/> Which of the following best describes your level of proficiency with developing Crystal Reports ?

The scoring factor will be listed on the Scoring Plan page:

SF	Name	Type	Case	# of Cases	Action
1	MQ - Education	Pass/Fail	View/Add Cases	0 !	Edit Delete

Notice the red-flagged error indication in the '# of Cases' column. Pass/Fail scoring factors must have a Scoring Factor Case to define which responses are passing or failing.

2.5 Click the **'View/Add Cases'** link to add a Scoring Factor Case

2.6 Click the **'Add New Factor Case'** link

2.7 Enter a title for the Scoring Factor Case, e.g., **'MQ – Education'**

* Case Title	MQ - Education
<div>Save</div>	

2.8 Click the 'Edit' link

Case	Title	Points	Action
Case 1	MQ - Education	Pass/Fail	Edit Delete

2.9 Click the 'Add Condition' link

* Case Title	MQ - Education
Formula	
Questions	Which best describes your level of education? Add Condition

[Save](#)

2.10 Specify the 'Correct Options' choice of '1+'

2.11 Place a check mark next to the options that are considered passing:
'Bachelor's Degree' and 'Master's Degree'

Which best describes your level of education?

Correct Options 1 +

☐ High School

☐ Some College

☐ Associate's Degree

☒ Bachelor's Degree

☒ Master's Degree

[Save](#) [Save & New](#)

2.12 Click 'Save'

- 2.13 Notice that the passing response options are displayed on the Scoring Factor Case page:

The screenshot shows a form titled 'MQ - Education'. It contains a question labeled '<ans1>' with the text 'Which best describes your level of education?'. Below the question are two radio button options: 'Bachelor's Degree' and 'Master's Degree'. A 'Formula' field contains the text '<ans1>'. At the bottom right is a 'Save' button.

Scoring Factor #1 is now complete.

2.14 **Scoring Factor #2:**

Click on the 'Scoring Factors' link at the top of the page:

The screenshot shows a navigation bar with the following links: 'Scoring Plan', 'Scoring Factors', and 'Scoring Factor Cases'. The 'Scoring Factors' link is highlighted with a red box and a hand cursor.

Click the 'Add New Scoring Factor' link

Fill in the Scoring Factor information:

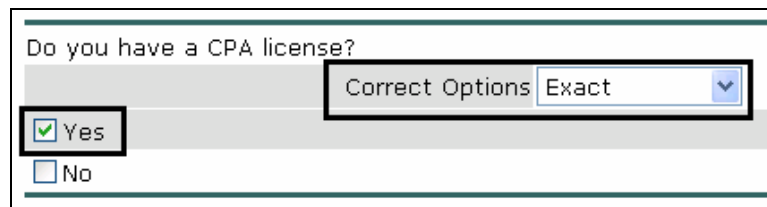
- **Factor Title:** 'MQ – CPA License'
- **Type:** 'Pass/Fail'
- Click 'Save'

Fill in the additional required fields:

- **Pass Required:** 'Yes'
- **Factor Questions:** Place a **check mark** in the box next to the second question relating to CPA license.
- Click 'Save'

The screenshot shows the 'Add New Scoring Factor' form. The 'Factor Title' is 'MQ - CPA License'. The 'Type' is 'Pass/Fail' (selected with a radio button). The 'Pass Required' is 'Yes' (selected with a radio button). Under 'Factor Questions', there are four questions. The second question, 'Do you have a CPA license?', is checked with a green checkmark. The other three questions are unchecked.

- 2.15 Click the 'View/Add Cases' link to add a Scoring Factor Case
- 2.16 Click the 'Add New Factor Case' link
- 2.17 Enter a title for the Scoring Factor Case, e.g., 'MQ – CPA License'
- 2.18 Click the 'Edit' link
- 2.19 Click the 'Add Condition' link
- 2.20 Specify the '**Correct Options**' choice of '**Exact**'
- 2.21 Place a check mark next to the option that is considered passing: '**Yes**'



Do you have a CPA license?

Correct Options: Exact

☒ Yes

☐ No

Scoring Factor #2 is now complete.

2.22 Scoring Factor #3:

Click on the 'Scoring Factors' link at the top of the page:



Click the '**Add New Scoring Factor**' link

Fill in the Scoring Factor information:

- **Factor Title:** 'MQ - Experience'
- **Type:** 'Pass/Fail'
- Click '**Save**'

Fill in the additional required fields:

- **Pass Required:** 'Yes'
- **Factor Questions:** Place a **check mark** in the box next to the third question relating to years of experience.
- Click '**Save**'

* Factor Title: MQ - Experience

* Type: ☒ Pass/Fail ☐ Scored

* Pass Required: ☒ Yes ☐ No

* Factor Questions:

- ☐ Which best describes your level of education?
- ☐ Do you have a CPA license?
- ☒ How many years of professional-level accounting experience do you have?
- ☐ Which of the following best describes your level of proficiency with Microsoft Excel?
- ☐ Which of the following best describes your level of proficiency with developing Crystal Reports?

- 2.23 Click the 'View/Add Cases' link to add a Scoring Factor Case
- 2.24 Click the 'Add New Factor Case' link
- 2.25 Enter a title for the Scoring Factor Case, e.g., 'MQ – Experience'
- 2.26 Click the 'Edit' link
- 2.27 Click the 'Add Condition' link
- 2.28 Specify the '**Correct Options**' choice of '**1+**'
- 2.29 Place a check mark next to the options that are considered passing: all options with two or more years.

How many years of professional-level accounting experience do you have?

Correct Options: 1 +

- ☐ 0 - 2 years
- ☒ 2 - 3 years
- ☒ 3 - 4 years
- ☒ 4 - 5 years
- ☒ 5 years or more

Scoring Factor #3 is now complete.

2.30 Scoring Factor #4:

Click the '**Add New Scoring Factor**' link

Fill in the Scoring Factor information:

- **Factor Title:** '**Scored Questions - Desirables**'
- **Type:** '**Scored**'
- Click '**Save**'

Fill in the additional required fields:

- **Score Points From:** '**Supplemental Questions**'
- **Factor Questions:** Place a **check mark** in the box next to each question that should be automatically scored (Questions 1, 3, 4, 5)
- Click '**Save**'

* Factor Title	Scored Questions - Desirables
* Type	<input type="radio"/> Pass/Fail <input checked="" type="radio"/> Scored
* Score Points	<input checked="" type="radio"/> Supplemental Questions
From	<input type="radio"/> Cases
* Factor Questions	<input checked="" type="checkbox"/> Which best describes your level of education? <input type="checkbox"/> Do you have a CPA license? <input checked="" type="checkbox"/> How many years of professional-level accounting experience do you have? <input checked="" type="checkbox"/> Which of the following best describes your level of proficiency with Microsoft Excel? <input checked="" type="checkbox"/> Which of the following best describes your level of proficiency with developing Crystal Reports?

2.31 Evaluation Plan Set-up

Click the 'Add Step' link in the Evaluation Step section of the Exam Plan:

Fill in the Evaluation Step information:

- **Step Type:** 'Supplemental Questionnaire'
- **Step Name:** Enter any name to describe this evaluation step'
- **Evaluate On:** 'Scored'
- Click 'Save'

* Step Type	Supplemental Questionnaire
Step Name	Auto-Scoring
Display Candidate Status As	
* Evaluate On	<input checked="" type="radio"/> Scored
	<input type="radio"/> Pass/Fail
Comments	
<input type="button" value="Save"/>	

Note: The combination of 'Supplemental Questionnaire' step type and evaluating on a 'Scored' basis are necessary for Insight to utilize the scoring plan for this evaluation step. Fill in the additional required Evaluation Step fields:

- **Final Score Weight:** any number from 0 - 100
(enter the percentage that you want the applicants' scores in this evaluation step to weigh into the applicants' final score/ranking on the eligible list)
- **Calculate Final Score:** 'Percentage Score'
- **Max Raw Score:** '30'
(the maximum number of points that an applicant can earn on all scored questions in the scoring plan)
- **Passing Score %:** '50%'
(applicants must score at least 15 points on questions 1,3,4, and 5 to pass this evaluation step)

- Click 'Save'

* Step Type	Supplemental Questionnaire
Step Name	Auto-Scoring
Display Candidate Status As	
* Evaluate On	<input checked="" type="radio"/> Scored <input type="radio"/> Pass/Fail
* Final Score Weight	30 % Max: 100
* Round Score	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Calculate Final Score Based on	<input type="radio"/> Rescaled Score <input checked="" type="radio"/> Percentage Score
* Max Raw Score	30
* Passing Score Percentage	50 %

Congratulations! Your Scoring Plan is now complete!

- 2.32 Enter a few applications for the job posting with a combination of different responses to the supplemental questions.
- 2.33 Access the Exam Plan and click on the 'View Applicants by Step' link
- 2.34 Update the disposition of the applicants in step 1 to passing
- 2.35 Advance the applicants to Step 2
- 2.36 Notice that the applicants scores are automatically entered:
 - Applicants who met the MQs and scored more than 50% of the available points are in a passing status.
 - Applicants who did not meet the MQs or scored less than 50% of the available points are in a failing status.

Step 2: Auto-Scoring							
4 records found.							
Step Comments							
Candidate	SSN	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Dodgers, Dillon		View	Pass - 76.67%		Paper	03/23/06 10:55 PM	N/A
<input type="checkbox"/> Eveready, Evelyn		View	Fail - 26.67%		Paper	03/23/06 10:56 PM	N/A
<input type="checkbox"/> Flinstone, Frederick		View	Fail - 0.00%		Paper	03/23/06 10:57 PM	N/A
<input type="checkbox"/> Gibson, Gwen		View	Fail - 36.67%		Paper	03/23/06 10:59 PM	N/A

View the Scoring Details for Applicants

- 2.37 Click on the 'View Exam Plan' link
- 2.38 Click the 'View Results' link for Step 2 (Auto-Scoring step)

- 2.39 A breakdown of passing and failing applicants is displayed. Click the 'View' link in the 'Details' column for an applicant to view the breakdown of how their score was calculated:

Gibson, Gwen

MQ - Education

Case: MQ - Education
Formula: 0
CRITERIA MET

Scoring Factor: **PASSED**

MQ - CPA License

Case: MQ - CPA License
Formula:
CRITERIA MET

Scoring Factor: **PASSED**

MQ - Experience

Case: MQ - Experience
Formula:
CRITERIA MET

Scoring Factor: **PASSED**

Scored Questions - Desirables

Question	Points	Answer	Formula
Which best describes your level of education?	0	Bachelor's Degree	<score>
How many years of professional-level accounting experience do you have?	6	4 - 5 years	<score>
Which of the following best describes your level of proficiency with Microsoft Excel ?	5	Intermediate	<score>
Which of the following best describes your level of proficiency with developing Crystal Reports ?	None	<score>	

Points: 11

Total Points: 11

Max Points: 30.000

Final Score: 37%